Place Stamp Here

Lodi District Chamber of Commerce
P.O. Box 386
Lodi, CA 95241

QUICK

MEMBERSHIP ACTIVITIES DIVISION

Doug Gerard, D.C., Vice President
(Hayes Chiropractic)

***Objective:** To promote local business, maintain good communication with members for retention, provide opportunities for self-promotion of members and recruitment of new members.*

Ambassadors Committee, Chairman

Alicia Hernandez (Bank of America)

* Hold Membership Coffees
* Hold quarterly Membership Orientation
* Hold Monthly Mixers
* Assist in Membership Retention
* Attend Ribbon Cuttings and Grand Openings
* Conduct Golf Tournament

Retail & Business Committee

Elizabeth Rosenquist (Wiggins & Associates)

* Promote Lodi Campaign (Coupon Book)
* Conduct Lodi Trade Show
* Provide Seminars
* Chamber/City Joint Promotional Program

President's Club

Duane Simpfenderfer
(I.D.S. Financial Services)

* Assist with Membership Acquisition on a personal basis

Lodi District Chamber of Commerce Board of Directors

**Evelyn Olson, (The Music Box)*
***Ray Hirning, (Best Western Royal Host Inn)*
Roscoe Brownfield, (Bank of America)
Deanna Enright, (King Videocable)
Doug Gerard, D.C., (Hayes Chiropractic)
Bob Johnson, (Duncan, Duncan & Assoc.)
Connie Lorz, (QBS)
Gary Lund, (Action Advertising)
Robert Maus, (Bank of Stockton)
Ron Mettler, (First Interstate Bank)
Dee Nietschke, (Dee Nietschke Real Estate)
Mary Anne Poore' , (Kirstin Poore' & Tolson)
Tony Racco, (Littlehale Vineyard, Inc.)
Steve Reeves, (The Reeves Co., Inc.)
Jim Schweickardt, (Pacific Coast Producers)
Eileen St. Yves, (E S Consultants)

*** 1992 President / ** 1992 President-Elect**

Lodi District Chamber of Commerce Staff

Les Dabritz, Executive Director
Patti Bates, Bookkeeper/Office Manager
Donna Koehnen, Marketing Director
Janice Mellgren, Secretary
Dianne Andre, Receptionist

...Your Team for Success!

LODI DISTRICT
CHAMBER OF COMMERCE
1330 S. HAM LANE, SUITE 102
P.O. BOX 386, LODI, CA 95241
(209)367-7840
Fax# (209)334-0528

"Get in on the Action"

with the

Lodi District Chamber of Commerce...

1992 PLAN OF ACTION

...Your Team for Success!

BUDGET & FINANCE DIVISION

Connie Lorz, Vice President
(Quality Business Service)

***Objective:** To review all revenue opportunities, oversee fiscal practices of the Chamber, reduce expense and report financial status of the Chamber to the Board and Members.*

Budget & Finance Committee

Connie Lorz (Quality Business Service)

* Oversee Chamber's Finances on a monthly basis
* Improve Financial Reporting and Accounting process

Fund Development Committee

Ron Myers (Pacific Coast Producers)

* Development of Short and Long Range Chamber Funding Plan
* Investigate and Recommend Major Sources of Non-dues Funding

Lodi Street Faire Committee

Dorean Rice (Credit Bureau of Lodi)

* Prepare Operating Plan, Budget and Marketing Strategy for two Street Faires for 1992
* Review and Evaluate Results

ECONOMIC DEVELOPMENT DIVISION

Bob Johnson, Vice President
(Duncan, Duncan & Assoc.)

***Objective:** To support the needs of existing businesses, promote business in general in Lodi, be sensitive to needs to special segments, i.e. industry and agribusiness, and work for opportunities to attract new businesses to Lodi.*

Economic Concerns Committee

Leon Zimmerman (Bank of Lodi)

* Interview Local Businesses on a Monthly Basis
* Develop a current Economic Profile of Lodi
* Work with PIC on Business Retention Program
* Participate in other Economic Development opportunities (Industrial tours, etc.)

Agribusiness Committee

Tony Racco (Littlehale Vineyard)
(merged with Economic Concerns Committee)

* Conduct Grape Day
* Sponsor Agribusiness Award
* Provide speakers at meetings
* Support 4H/FFA Booster Program
* Review Agribusiness-Related political issues, coordinate with GTRC for action if necessary

Industrial Relations Committee

Krana Dworkin (U.S.A. Fashion Magic)
(merged with Economic Concerns Committee)

* Conduct Industrial Barbecue
* Provide speakers at meetings
* Sponsor Industrial Seminars

Tourism Committee

Ronnie Whitman (Wine Country Travel)

* Support Visitors Center (Improved Publications, Saturday Hours, Lodi Products Display and expanded Community Information)
* Participate in San Joaquin Visitors & Convention Bureau and Central Valley Tourism Association
* Improve Signs in Lodi ("Welcome to Lodi")
* Assist Cherokee Lane Beautification Project
* Promote Positive Image of Lodi

COMMUNITY INVOLVEMENT DIVISION

Jim Schweickardt, Vice President
(Pacific Coast Producers)

***Objective:** Take a pro-active role in community and legislative issues and community concerns, including educational concerns and developing new leadership for the furture.*

Government and Transportation Review Committee (GTRC)

Robert Maus (Bank of Stockton)

* Conduct televised Public Office Candidates Forum
* Present position recommendation on ballot issues to represent the concerns of member businesses
* Influence public policy at appropriate level of government on transportation and governmental issues to represent the needs of member businesses
* Speak for all committees on governmental concerns in a timely manner

Education Committee/School Relations

Harvey Robins (Tax Management Service)

* Provide business advisory role to LUSD to infuse career education into curriculum
* Develop and implement "Lodi Compact" with LUSD
* Provide recognition to selected students of LUSD
* New Educators Welcome

Leadership Lodi Steering Committee

Linda Briw (Walter Cribbins, Inc.)

* Hold Third Annual Leadership Lodi Program
* Support Alumni Group to encourage on-going participation in the Chamber

Be a part of the Lodi Chamber Action.

Simply...Use this Quick Pick Form

All Chairmen/key staff contact shown in ()

BUDGET & FINANCE DIVISION

☐ Lodi Street Faire — (Dorean Rice) Lodi Credit Bureau

COMMUNITY INVOLVEMENT DIVISION

☐ Government & Transportation Review Committee — (Bob Maus) Bank of Stockton

☐ Leadership Lodi Steering Committee — (Linda Briw) Walter Cribbins Co.

☐ School Relations — (Harvey Robbins) Tax Mgmt. Serv.

ECONOMIC DEVELOPMENT DIVISION

☐ Agribusiness — (Tony Racco) Littlehale Vineyards

☐ Economic Concerns — (Leon Zimmerman) Bank of Lodi

☐ Industrial Relations — (Krana Dworkin) U.S.A. Fashion Magic

☐ Tourism — (Ronnie Whitman) Wine Country Travel

MEMBERSHIP ACTIVITIES DIVISION

☐ Ambassadors — (Alicia Hernandez) Bank of America

☐ Retail & Business — (Liz Rosenquist) Wiggins & Assoc.

☐ Presidents Club — (D. Simpfenderfer) I.D.S. Financial Serv.

NAME _____

FIRM _____

ADDRESS _____

PHONE # _____

SIGNATURE _____

Lodi DISTRICT CHAMBER OF COMMERCE

CHEROKEE LANE
BUSINESS COMMITTEE MEETING

Friday, July 24, 1992
12:00 p.m.
Croce's Restaurant

A G E N D A

I. WELCOME - President Evelyn Olson

II. INTRODUCTION OF HEAD TABLE - President Evelyn Olson

III. SELF INTRODUCTION

A. Please state your firm and who you are representing.

IV. EXPLANATION OF THE AGENDA/PACKET - Executive Director Les Dabritz

V. BRIEF CHEROKEE LANE CHRONOLOGICAL RECAP - Tom Peterson/Jack Ronsko
City of Lodi

VI. YOUR INPUT - Evelyn Olson/Les Dabritz/Ray Hirning, LDCC

VII. BUSINESS CARD DRAWING - President-Elect Ray Hirning

VIII. FOLLOW-UP MEETING ON CHEROKEE LANE - August 28, 1992,
(time & location to be announced)

IX. ADJOURNMENT - 1:30 p.m.

1330 S. HAM LANE • P.O. BOX 386 • LODI, CA 95241 • PHONE (209) 367-7840 • FAX (209) 334-0528

TEN YEARS
ACCREDITED
CHAMBER OF COMMERCE
CHAMBER OF COMMERCE OF THE UNITED STATES

LODI SALES TAX

Hinderliter, de Llamas and Associates
(818) 963-9044

1992 First Quarter Receipts for Sales During October - December 1991

City Summary

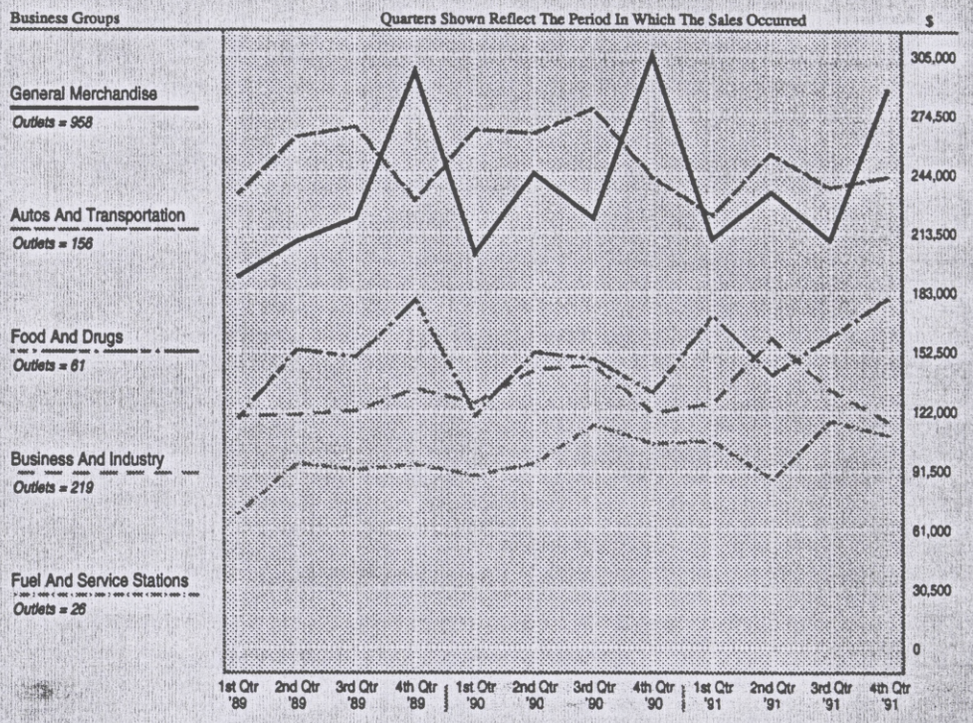
The city's March receipts for sales occurring during the 1991 Christmas quarter were 3.7% higher than in 1990. However, the "double-up" of a series of previously late payments temporarily inflated the new car dealership, supermarket, and light industrial categories and skewed overall comparisons. Actual sales activity was down 1.2% when adjusted for these and other aberrations.

Depressed sales of new cars, heavy equipment and building materials continued to be the primary factors contributing to the reduction. Department store sales were also lower than the previous Christmas. The new sales tax on junk food and periodicals helped boost some categories of market sales. Recent additions to the sales tax base included: BP Foods, American Cynosure, Lodi Auto Exchange, and Muller Supply.

Revenue comparisons for the fiscal year to date are:

	July-Mar. 1991-92	July-Mar. 1990-91
Direct Sales	$3,300,459	$3,374,673
Allocation Pools	459,005	556,807
Total	$3,759,464	$3,931,480

Sales Tax By Major Business Group



What Constitutes "Point of Sale"?

With retailing becoming a "zero-sum" game, more agencies are looking to business-to business sales to balance their tax bases. To ensure that the revenue from industrial focused businesses are allocated to your jurisdiction, the following criteria must be met:

•The business must sell merchandise directly to the ultimate "consumer" or "user" of the product for use in California. Sales tax is not charged to wholesalers, distributors, or out-of-state customers.

•The permanent place of business for the order desk or salesperson who negotiates the sale must be located within your jurisdiction. Salesmen working out of their homes do not count as "point of sale" nor do marketing representatives who merely show the product rather than negotiate or take orders. Desks taking orders for sales contracts that were negotiated elsewhere are also not considered "point of sale."

•The merchandise must be shipped to the customer from within California, although it does not have to be warehoused in your jurisdiction. If it is shipped directly to the customer from out of state, the Board of Equalization treats the revenue as a use tax which is distributed via an "allocation pool" rather than to "point of sale." Your share of the allocation pool is determined by the percentage that your sales tax is to the total of all agencies within the pool.

•Sales that include the permanent affixation or installation of materials or equipment to the customer's property are treated as a "use tax" and are also allocated via the pools. Therefore, contractors are not normally direct sales tax generators but sellers of equipment and materials to contractors are.

QUIRKS

Under your contract, the Board of Equalization, has discretion in modifying how the local sales tax is distributed for purposes of administrative convenience. Therefore, local sales tax distribution has developed some idiosyncrasies over the years. Some of the more common:

1.Sales tax charged as part of a lease payment is usually allocated via an allocation pool even if the "point of sale" is known. Exceptions are short-term rentals of small tools and vehicles, small mobile equipment such as pagers, and some auto leases where the lender is both the seller of the automobile and the financier.

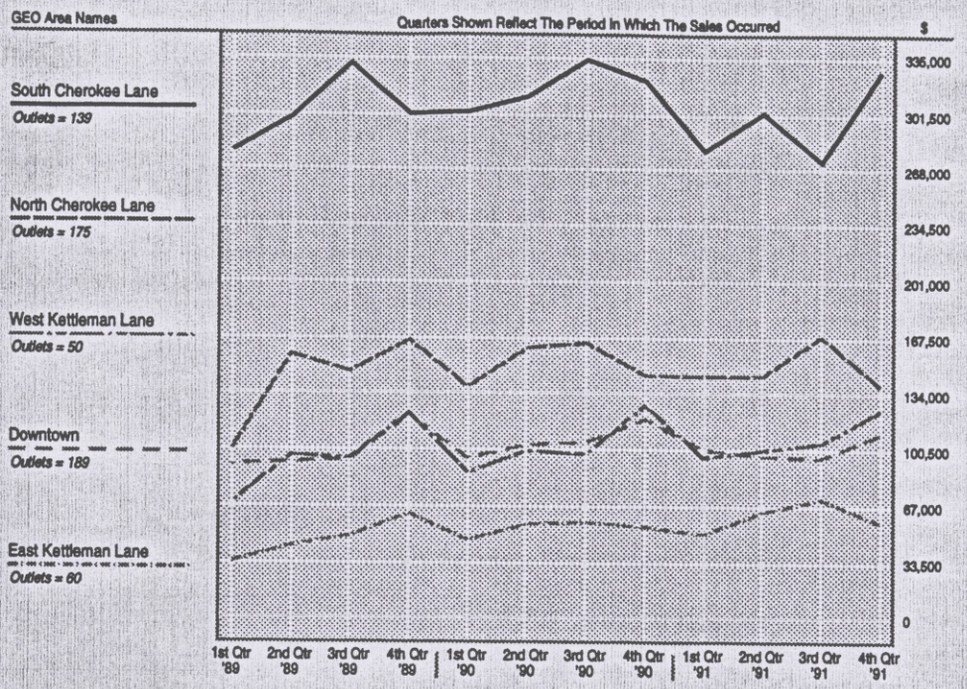
2.Independent manufacturing representatives do not count as the "point of sale" for the orders that they take and negotiate for client companies because as independent agents, they are not responsible for paying the tax.

3.Sales offices do not count as "point of sale" for your jurisdiction if the merchandise is shipped to the customer from "out of state." Conversely, companies who inventory and ship merchandise from "in state" do not count as "point of sale" if the sales person or order desk is located outside of California.

4.Services are taxable only if they are a part of the sale or if the true object of the transaction is considered to be the sale of tangible personal property. Examples include: repairs if the retail value of parts and materials is more than 10% of the total charge; printing; and engineering and maintenance contracts if those services are mandatory to the sale of the product.

5.Exemptions. Some of the wide variety of exemptions from sales tax are itemized on the next page.

Sales Tax By Geographic Area



SALES TAX EXEMPTIONS

Animals sold for human consumption
Artworks purchased for a museum
Catalogs, flyers, and junk mailers
Coin and medal collections exceeding $1000 in value
Common Carrier Aircraft and supplies
Containers and labels to be resold as part of the product
Custom computer programs
Goods made by charitable organizations
Food sold for home preparation or consumption other than "junk" food
Fuel for propellor driven airplanes (jet fuel is taxable)
Gas, electricity, and non-bottled water
Occasional sales other than vessels, aircraft, and vehicles
Prescription medicines and devices
Rail freight cars
Seeds, plants, fertilizer, and feed used to raise food for human consumption
Telegraph and telephone lines
Trucks and trailers for inter-state use
Watercraft used in interstate and foreign commerce and in commercial fishing
Sales to the federal government

Top 25 Business Categories

State Board of Equalization Business Classifications	Current Quarter #	Current Quarter $	Current Quarter %	Same Qtr Prior Year #	Same Qtr Prior Year $	Same Qtr Prior Year %
1 NEW MOTOR VEHICLE DEALERS	7	180,206	15.84%	7	177,606	16.16%
2 DEPARTMENT AND DRY GOODS STORES	9	126,333	11.10%	9	130,582	11.88%
3 GROCERY STORES WITH LIQUOR LICENSES	12	90,385	7.94%	12	45,008	4.09%
4 SERVICE STATIONS	17	70,060	6.16%	18	61,695	5.61%
5 PUBLISHERS,LIGHT INDUSTRIAL EQUIP.	52	59,030	5.19%	52	44,959	4.09%
6 EATING/DRINKING PLACES NO ALCOHOL	64	55,683	4.89%	67	55,321	5.03%
7 DRUG STORES	11	51,814	4.55%	12	50,940	4.63%
8 PETROLEUM PRODUCTS AND EQUIP.	9	39,531	3.47%	9	43,612	3.97%
9 CONST. CONTRACTORS, WHSLE. LUMBER	51	37,591	3.30%	54	40,520	3.69%
10 LUMBER AND BUILDING MATERIALS	8	30,794	2.71%	10	34,231	3.11%
11 EATING/DRINKING PLACES-BEER AND WINE	47	25,278	2.22%	48	28,800	2.62%
12 GROCERY STORES WITH BEER AND WINE	13	20,640	1.81%	14	21,126	1.92%
13 AUTOMOTIVE SUPPLY STORES	28	20,511	1.80%	33	26,055	2.37%
14 HOUSEHOLD AND HOME FURNISHINGS	27	20,080	1.76%	24	19,618	1.78%
15 EATING/DRINKING PLACES-LIQUOR	23	17,767	1.56%	22	18,219	1.66%
16 SPECIALTY STORES	80	17,607	1.55%	73	16,717	1.52%
17 REPAIR AND HAND-TRADE SHOPS	55	16,436	1.44%	57	27,312	2.48%
18 AUTO REPAIR SHOPS AND GARAGES	78	16,227	1.43%	85	16,957	1.54%
19 HEAVY INDUSTRIAL EQUIP.	26	13,490	1.19%	25	18,826	1.71%
20 USED AUTOMOTIVE DEALERS	22	11,985	1.05%	21	6,670	0.61%
21 FARM AND CONSTRUCTION EQUIPMENT	7	11,724	1.03%	7	21,219	1.93%
22 PAINT, GLASS, AND WALLPAPER	11	11,172	0.98%	9	6,991	0.64%
23 PUBLIC UTILITIES AND TRANSPORTATION	14	10,568	0.93%	13	11,914	1.08%
24 PACKAGE LIQUOR STORES	7	10,565	0.93%	7	11,090	1.01%
25 FOOD/FARM PRODUCTS AND EQUIPMENT	9	10,053	0.88%	7	12,991	1.18%
RETAIL STORES	566	888,695	77.89%	551	839,120	76.28%
PART TIME BUSINESSES	452	6,898	0.60%	496	7,941	0.72%
BUSINESS & PERSONAL SERVICES	245	44,078	3.86%	247	52,024	4.73%
ALL OTHER OUTLETS (INDUSTRIAL)	382	198,284	17.38%	372	200,427	18.22%
TOTAL ALL ACCOUNTS	1,645	1,140,951		1,666	1,100,090	

CHEROKEE LANE CHRONOLOGICAL RECAP

1964	State relinquished Cherokee Lane right of way to City of Lodi.
November 1965	City retained Paul Tritenbach to prepare Cherokee Lane landscape plan from Vine Street south.
June 1966	Council authorized Tritenbach and Schipanski to expand the master landscape plan for Cherokee Lane from freeway to freeway.
November 1966	City's traffic engineer, D. Jackson Faustman, recommended a center median on Cherokee Lane.
January 1967	Cherokee Lane master plan presented to City Council. Council asked merchants and property owners to study plan and come to consensus on what they wanted. There were numerous meetings with the Cherokee Lane merchants and the Chamber's Civil Affairs Committee. There was never agreement for the plan as a whole, and, to our knowledge, no formal recommendation from the Chamber to the City of Lodi. However, since the plan was accepted and paid for by the City, this plan has been used with respect to Cherokee Lane development. The City has required developers to install curb, gutter, sidewalk and landscaping from the street to the property line in conformance with this plan.
December 1967	Cherokee Lane Merchants Association requesting up-to-date lighting costs on Cherokee Lane and indicating concern of City's finalizing landscape master plan.
March 1967	Cost estimate prepared for median installation (including street lights) per proposed Tritenbach plan, dated November 1966. Estimate, not including engineering and contingencies, was approximately $126,000.
January 1968	Cherokee Lane street light estimates prepared by the Utility Director for center island construction ($58,000) and curb side construction ($100,000).
January 1971	Ron Thomas wanted to formulate a street light district and requested City to prepare street lighting estimate with light alongside of street (not per master plan) from Highway 99 on the north to south of Kettleman Lane.
March 1977	Report made to Council on street light district petition (north from Highway 99 to south of Kettleman Lane) being circulated by Richard Sanborn. Only 48.91% of front footage signed. The committee could not get the required 60%.

1985 — City had one inch equals forty feet aerial photos prepared for the full length of Cherokee Lane.

November 1986 — Questionnaire prepared by the Cherokee Lane Enhancement Project Subcommittee prioritized the improvement needs as follows:

1. Street lighting
2. Roadway improvement
3. Condition of curbs and gutters
4. Sidewalks
5. Landscaping improvements
6. "Welcome to Lodi" sign
7. Sign control
8. Remove utility poles
9. Storm drains

September 1987 — At request of Cherokee Lane Beautification Committee (headed by Walt Sanborn and Lance Ellis), City prepared a request for proposal (RFP) for Cherokee Lane master plan update.

December 1987 — City sent letter to Cherokee Lane Beautification Committee indicating six proposals were received ranging from $7,500 to $29,850. Committee needed to raise $20,000 before City could proceed.

1988 — Cherokee Lane Enhancement Project Committee retained Morris & Wenell architects to design entrance signs for Cherokee Lane at the following locations:

1. North of Kettleman Lane (Highway 12) - northbound traffic
2. At Victor Road - westbound traffic
3. At Turner Road underpass - southbound traffic

October 1991 — Bus tour of Cherokee Lane with City staff, Council, and Chamber representatives. Major problems, all related to beautification, were pointed out and discussed.

July 14, 1992

TO; Lodi District Chamber of Commerce
(Please complete and leave with us today)

_____please countme in on the Cherokee Lane Business Committee. I/we would like to be advised and participate in future meetings of the Committee.

NAME_____ ADDRESS_____

FIRM_____ PHONE_____

IN ADDITION TO MYSELF, THE FOLLOWING WOULD ALSO LIKE TO ATTEND THE MEETINGS FROM MY FIRM;

_____ _____

_____ _____